PeopleSoft 9.0
ePerformance Module

Student Manual

Office Of Human Resources
Training and Organization Development &
Classification and Compensation

DENVER
OFFICE OF HUMAN RESOURCES

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ACCESSING PEOPLESOFT EPERFORMANCE

To access PeopleSoft ePerformance perform the following steps:

- Click on the Home Page Tab
- In the Global Menu, click on “Online Tools and Programs”
- Click on “PeopleSoft Tools”
- Click on “Manager Self Service”
- Click on “Performance Management”

Create Documents (PEP)

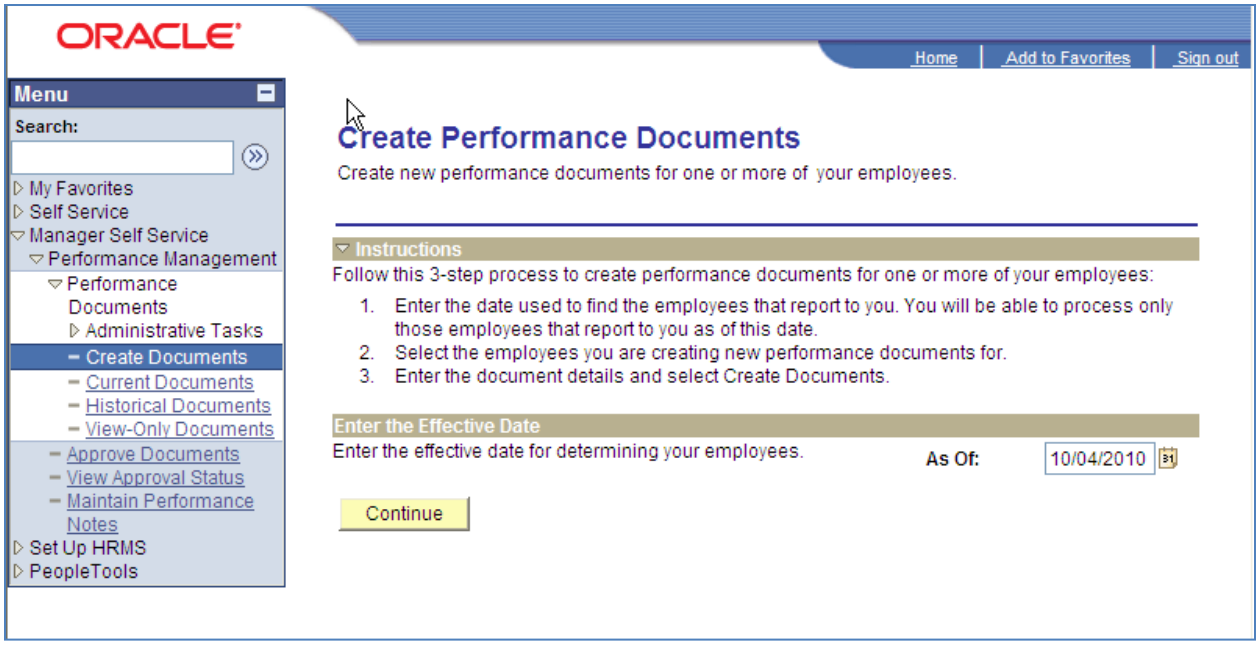
Section Objective:

- Create performance documents (PEP)

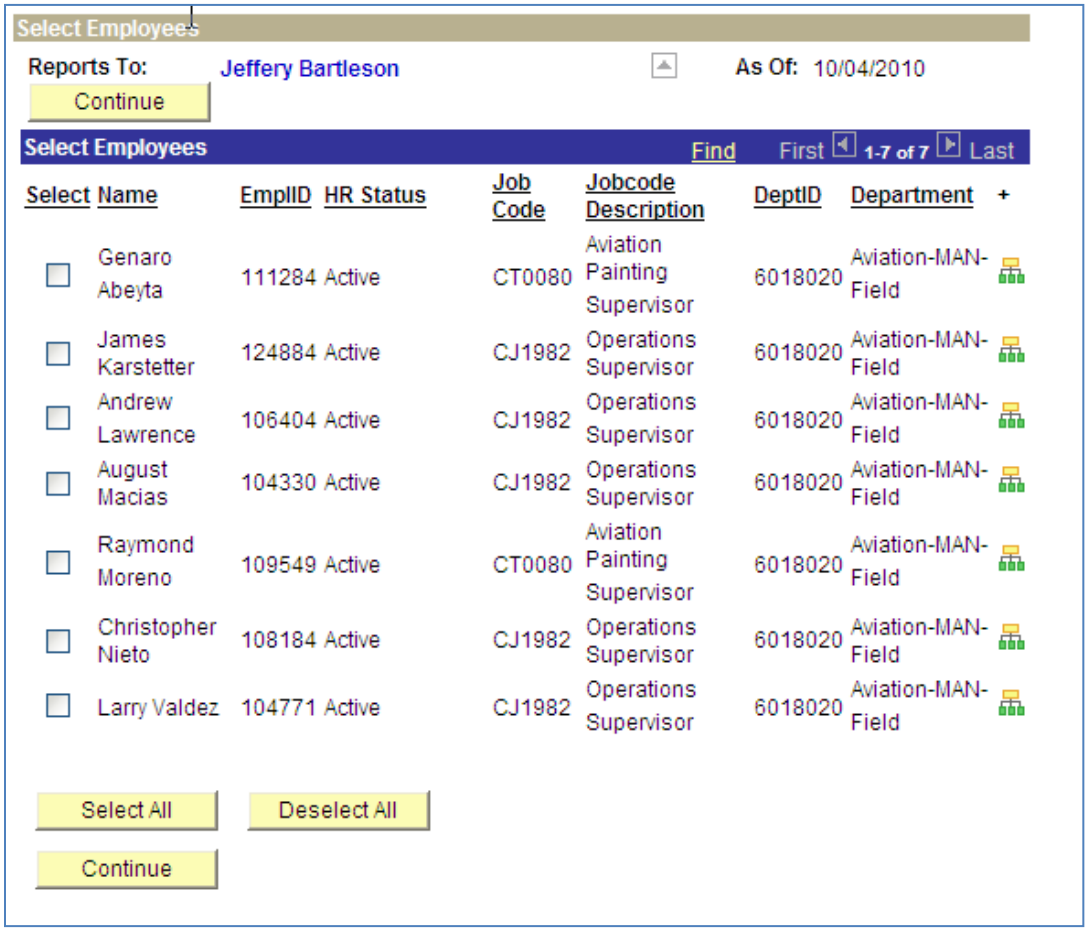
The first step is to create documents for your direct reports. To start the process click on:

1. Performance Documents
2. Create Documents

From the “Create Performance Documents” screen enter the “As Of” date for determining your employees and then click the “continue” button.

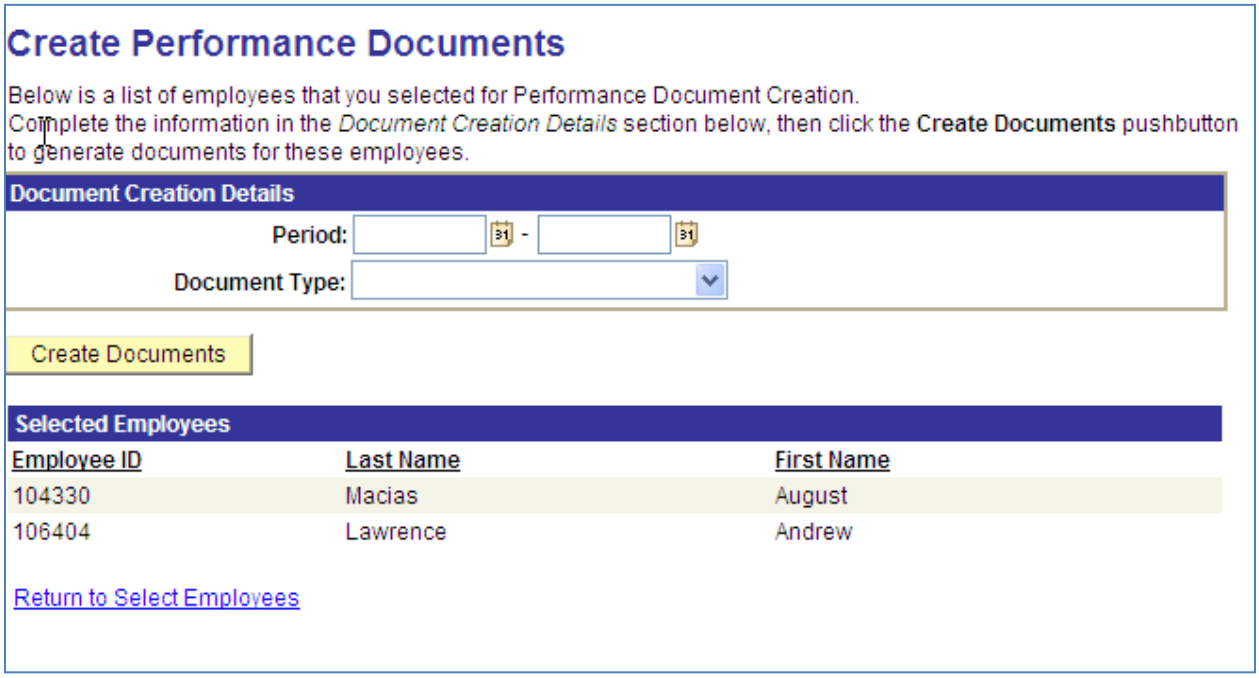

ORACLE
Home
Add to Favorites
Sign out
Menu
Search:
My Favorites
Self Service
Manager Self Service
Performance Management
Performance Documents
Administrative Tasks
Create Documents
Current Documents
Historical Documents
View-Only Documents
Approve Documents
View Approval Status
Maintain Performance Notes
Set Up HRMS
PeopleTools
Create Performance Documents
Create new performance documents for one or more of your employees.
Instructions
Follow this 3-step process to create performance documents for one or more of your employees:
1. Enter the date used to find the employees that report to you. You will be able to process only those employees that report to you as of this date.
2. Select the employees you are creating new performance documents for.
3. Enter the document details and select Create Documents.
Enter the Effective Date
Enter the effective date for determining your employees.
As Of:
10/04/2010
Continue

After clicking the "Continue" button, you should see a list of direct reports based on the "As of" date entered in the prior screen.


Select Employees
Reports To: Jeffery Bartleson
As Of: 10/04/2010
Continue
Select Employees
Find
First 1-7 of 7 Last
Select Name EmplID HR Status Job Code Jobcode Description DeptID Department +
Genaro Abeyta 111284 Active CT0080 Aviation Painting Supervisor 6018020 Aviation-MAN-Field
James Karstetter 124884 Active CJ1982 Operations Supervisor 6018020 Aviation-MAN-Field
Andrew Lawrence 106404 Active CJ1982 Operations Supervisor 6018020 Aviation-MAN-Field
August Macias 104330 Active CJ1982 Operations Supervisor 6018020 Aviation-MAN-Field
Raymond Moreno 109549 Active CT0080 Aviation Painting Supervisor 6018020 Aviation-MAN-Field
Christopher Nieto 108184 Active CJ1982 Operations Supervisor 6018020 Aviation-MAN-Field
Larry Valdez 104771 Active CJ1982 Operations Supervisor 6018020 Aviation-MAN-Field
Select All
Deselect All
Continue

Select the names of the individuals that require a PEP followed by the “Continue” button. Note: If you would like to do all PEP’s at once, click the “Select All” button followed by the “Continue” button.

You will then have access to the “Create Performance Documents” screen showing the individuals selected as well as the “period start and end date” and “Document type” fields.



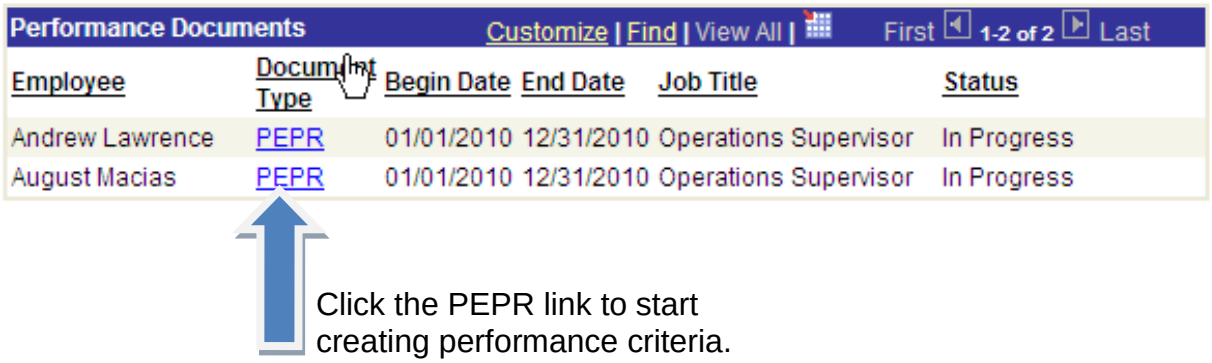
- The start and end dates will be for the evaluation period (i.e. 1/1/2013 – 12/31/13).
- There is one option for Document type and that is “PEPR”.
- The “Create from Prior Document” field and “Template” fields will appear once the “PEPR” document type has been selected. If you are creating a PEP from scratch, make sure to once again select “PEPR” in the “Template” field and leave the “No” option selected in the “Create from Prior Document” field. It you want to copy or “clone” a PEP to use on another employee, go to the next section for instructions.
- Click the “Create Documents” button.

The “Create Performance Documents – Results” screen appears that will include a “Create Documents” and “Current Documents” links. To continue the process, click on the “Current Documents” link.

To begin the editing process click the “PEPR” link next to the employee you would like to edit.

Current Performance Documents

Listed below are the current performance documents for which you are the Supervisor.



Performance Documents		Customize | Find | View All |		First 1-2 of 2 Last	
Employee	Document Type	Begin Date	End Date	Job Title	Status
Andrew Lawrence	PEPR	01/01/2010	12/31/2010	Operations Supervisor	In Progress
August Macias	PEPR	01/01/2010	12/31/2010	Operations Supervisor	In Progress

Click the PEPR link to start creating performance criteria.

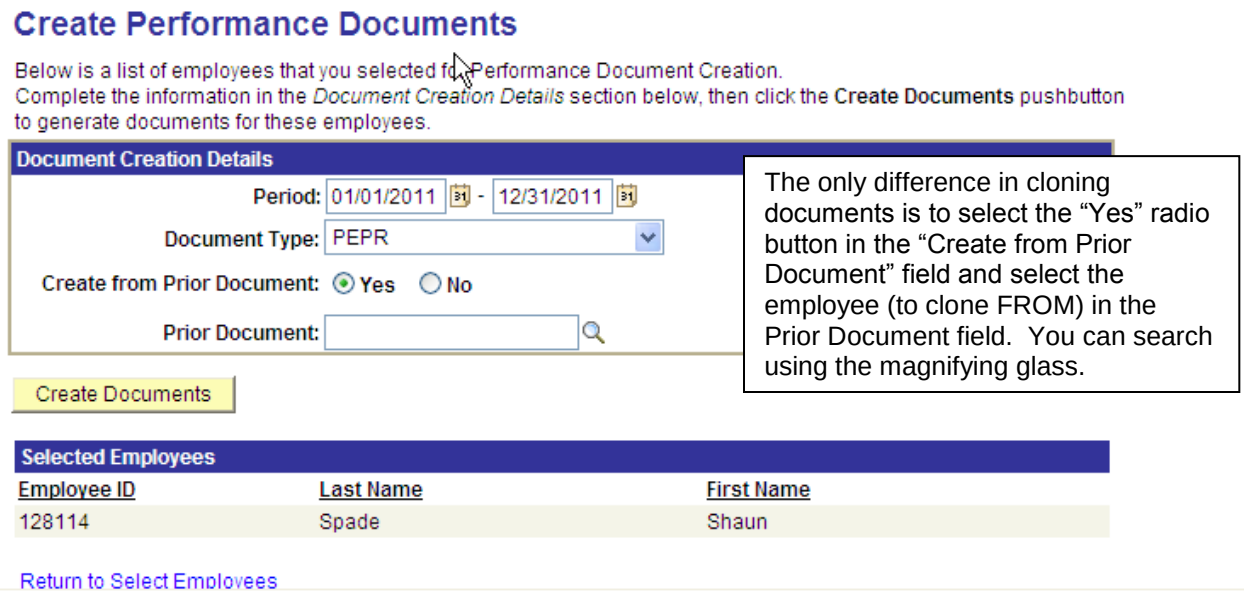
Create Performance Documents/PEP by Cloning

Section Objective:

- Clone/Copy an already existing PEP/R to use on another employee.

One of the nice features of this system is that you can take an already existing report and make a copy to use for another employee. This is called “Cloning”. To clone, follow these steps:

- Click on Performance Documents
- Click on Create Documents
- Enter the “As of date” to obtain the direct reports list. Click the Continue button
- Select the employees FOR whom you would like to create documents
- Click the Continue button
- Enter the start date and end date for the evaluation period in the Period field
- Choose “PEPR” in the Document type dropdown field
- Click the “Yes” radio button in the “Create from Prior Document” field


Create Performance Documents
Below is a list of employees that you selected for Performance Document Creation.
Complete the information in the Document Creation Details section below, then click the Create Documents pushbutton to generate documents for these employees.
Document Creation Details
Period: 01/01/2011 - 12/31/2011
Document Type: PEPR
Create from Prior Document: Yes No
Prior Document:
Create Documents
Selected Employees
Employee ID
Last Name
First Name
128114
Spade
Shaun
Return to Select Employees
The only difference in cloning documents is to select the "Yes" radio button in the "Create from Prior Document" field and select the employee (to clone FROM) in the Prior Document field. You can search using the magnifying glass.

- Click the magnifying glass search icon to search for the document from which you would like to clone
- From the search results, click on the employee name link in the evaluate column to select the "from clone" document
- Click the "Create Documents" button

Exercise: Create Performance Documents

Create three additional performance documents from your direct reports list for the evaluation period 1/1/2010 – 12/31/2010.

1. Create three performance documents for three separate individuals for the evaluation period 1/1/10 – 12/31/10.
2. Once you have created the documents, click on the "current documents" link found at the bottom of the Create Performance Documents – Results page to verify that the documents have been created.

QUESTIONS:
What do you click on in the main menu to start this process? _____

What would you click on in the main menu to access performance documents once they have been created?_____

Create Performance Criteria (PEP)

Section Objectives:

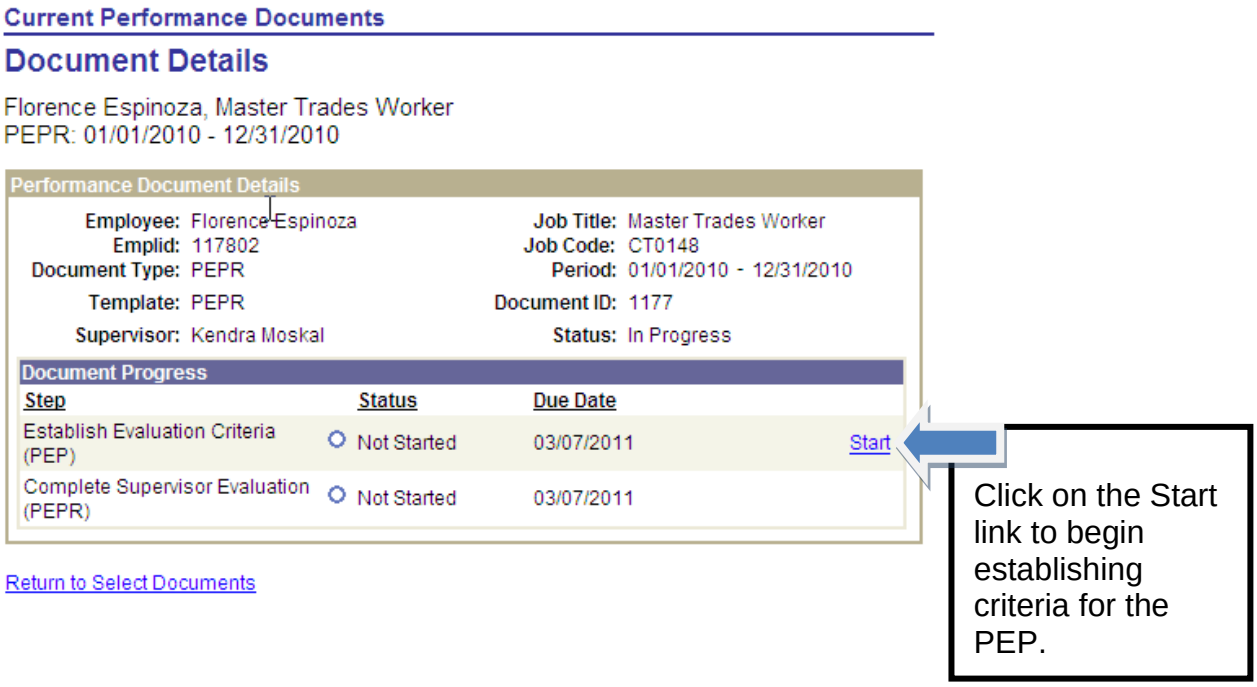
- Add and Weight Outcome(s)
- Add Additional Duty(ies)
- Add Development Section

To establish performance criteria for the PEP, follow this path:

1. Manager Self Service
2. Performance Management
3. Performance Documents
4. Current Documents

You will be taken to the “Current Performance Documents” screen.

Click on the “PEPR” link next to the person you would like to edit. This will take you to the “Document Details” screen which includes the name of the individual, title and evaluation period (start date and end date of the evaluation period).



This screen contains information including the “Establish Evaluation Criteria (PEP)” with a “Start” link as well as the “Complete Supervisor Evaluation (PEPR) sections. To begin editing a PEP, click on the “Start” link.

City and County of Denver

Performance Criteria (PEP) - Draft

Stan Lechman Jr., Legal Secretary
PEPR: 01/01/2009 - 12/31/2009

Reopen | Cancel | Return to Document Detail

Section 1 - Duties

Below are the formal duties for this job classification. If employee is performing additional duties not listed in this section, add the duty statement by clicking the Add Duties link.

CC0271 - Legal Secretary - Operations

Description: Performs secretarial duties utilizing legal terminology, procedures and documents. Reviews and distributes documents. Reviews attorney case files, updates case records, composes legal pleadings using attorney outlines. Obtains case information from legal sources, confirms and relays information. By position, may train other clerical employees.

Section 2 - Outcomes

STARS Values: Service, Teamwork, Accountability and Ethics, Respect, Safety.

Measurement Tools: Customer Feedback, Team Feedback, Peer Feedback, Supervisor Observations, Reports.

Select the appropriate STARS value and measurement tool and enter them in the STARS and Measures section for each Outcome after clicking Add an Outcome link.

Outcomes will be evaluated by: Supervisor

Outcome 1

Description: Outcome 1
STARS Values/Measurement Tools:
STARS: Service, Teamwork
Measurement:
Weight: 0 %

Outcome 2

Description: Outcome 2
STARS Values/Measurement Tools: STARS: Service, Safety
Weight: 0 %

Section Summary
Section Weight: 100 % (not less than 100%)

Section 3 - Development

Training

Description: Attend an Advanced Word class.

Section 4 - Employee Comments

Employee Comments

Section 5 - Supervisor Comments

Supervisor Comments

Reopen | Cancel | Return to Document Detail

Example of the PEP template.

- Click on "**Add an additional Duty**" to add a duty.
- Click on "**Add an Outcome**" to add an outcome.
- Click on "**Add a Development Item**" to add development items.

The ability to assign a weight to outcomes for rating purposes is available. If you decide to use this feature, the total weight must be 100.

You can establish performance criteria for a PEP by editing or adding to these three sections:

- To add an additional duty – Click on the “Add an Additional Duty” link.
- To add an outcome – Click on the “Add an Outcome” link
- To add a Development Item – Click on the “Add a Development Item” link.

Complete each field: “Title”, “Description”, “STARS Values/Measurement Tools” and then click the “Update” button to add to the PEP. You can also check spelling by clicking on the spell check icon located to the right of many of these fields. The icon is a book with a checkmark. Once you are satisfied, don’t forget to save the document.

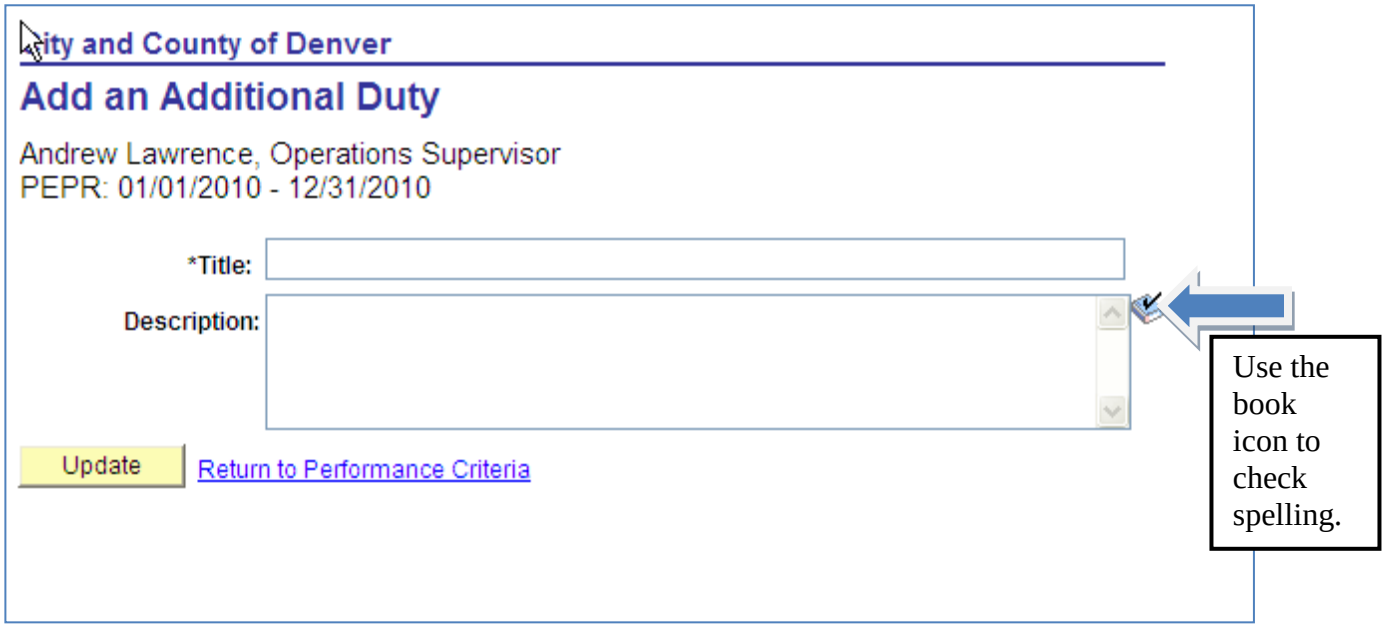


Figure 1: Add an Additional Duty Example

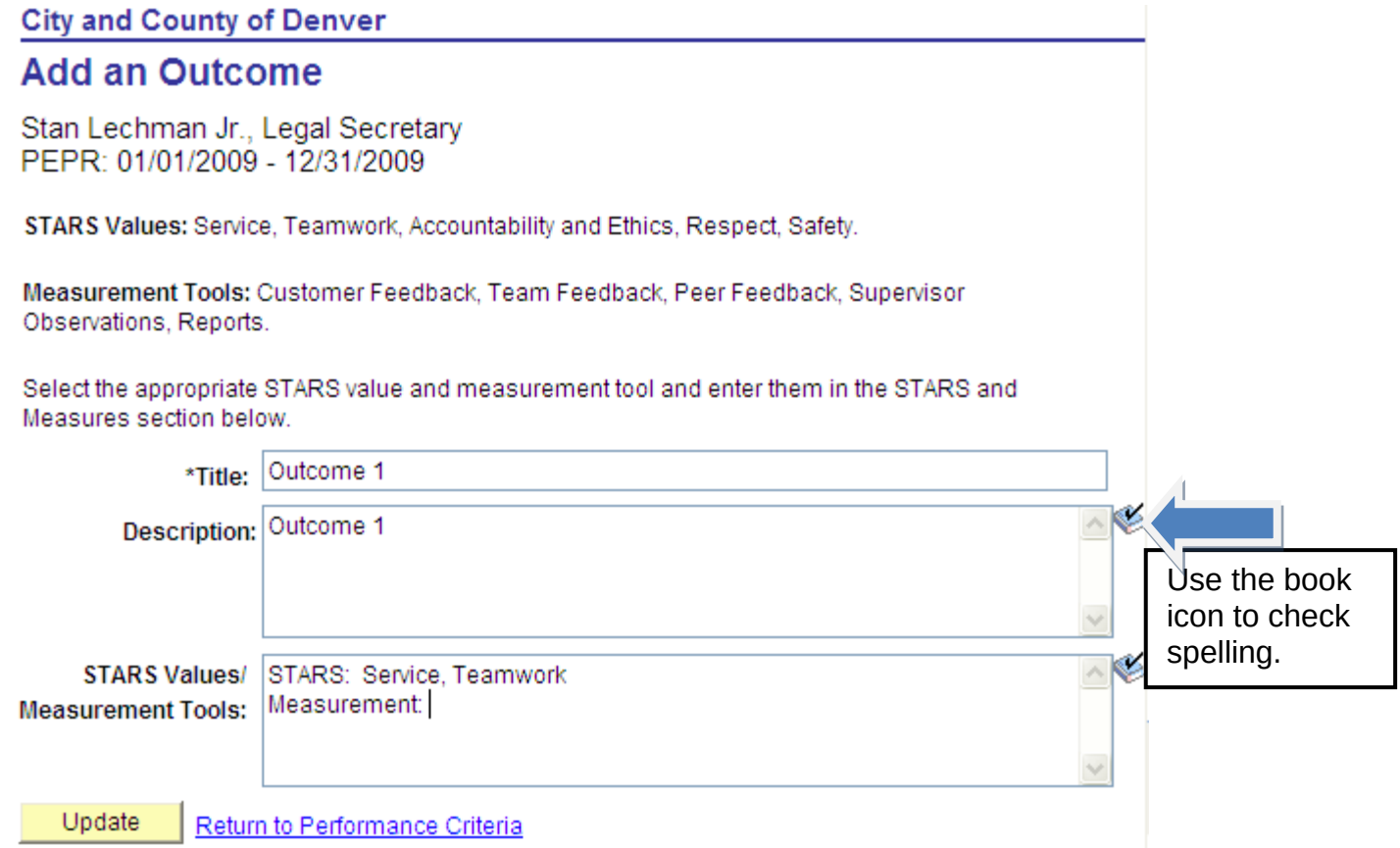

City and County of Denver
Add an Outcome
Stan Lechman Jr., Legal Secretary
PEPR: 01/01/2009 - 12/31/2009
STARS Values: Service, Teamwork, Accountability and Ethics, Respect, Safety.
Measurement Tools: Customer Feedback, Team Feedback, Peer Feedback, Supervisor Observations, Reports.
Select the appropriate STARS value and measurement tool and enter them in the STARS and Measures section below.
*Title:
Outcome 1
Description:
Outcome 1
STARS Values/ Measurement Tools:
STARS: Service, Teamwork
Measurement:
Update
Return to Performance Criteria
Use the book icon to check spelling.

Figure 2: Add an Outcome Example

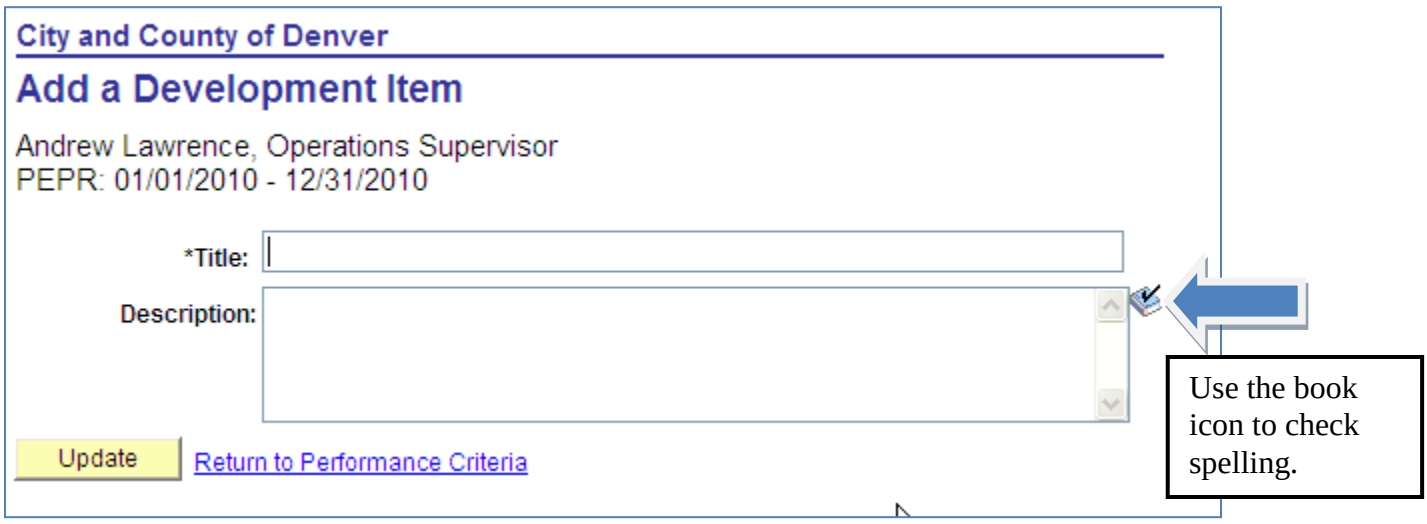
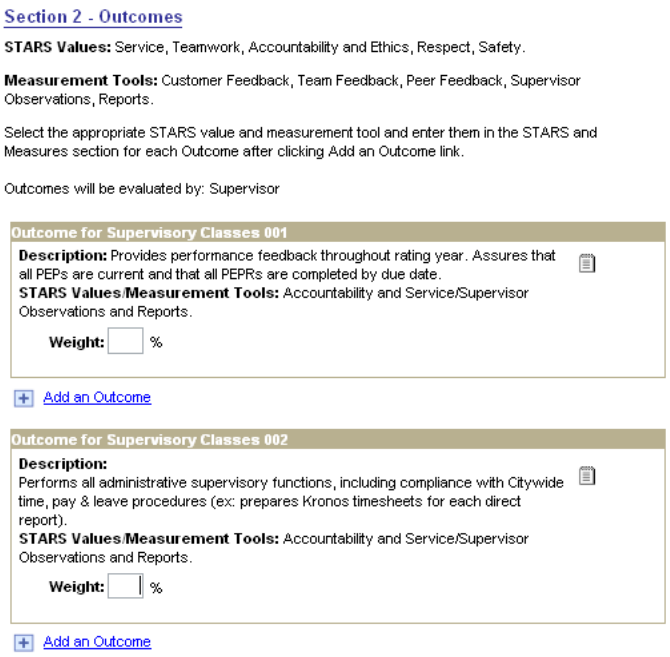


Figure 3: Add a Development Item Example

Delivered Outcomes

Certain job classifications that require supervision will have two delivered outcomes appear in each PEP/R. As with the delivered duties that are associated with the job specifications, these delivered outcomes will not be able to be changed or deleted.


Section 2 - Outcomes
STARS Values: Service, Teamwork, Accountability and Ethics, Respect, Safety.
Measurement Tools: Customer Feedback, Team Feedback, Peer Feedback, Supervisor Observations, Reports.
Select the appropriate STARS value and measurement tool and enter them in the STARS and Measures section for each Outcome after clicking Add an Outcome link.
Outcomes will be evaluated by: Supervisor
Outcome for Supervisory Classes 001
Description: Provides performance feedback throughout rating year. Assures that all PEPs are current and that all PEPRs are completed by due date.
STARS Values/Measurement Tools: Accountability and Service/Supervisor Observations and Reports.
Weight: %
Add an Outcome
Outcome for Supervisory Classes 002
Description:
Performs all administrative supervisory functions, including compliance with Citywide time, pay & leave procedures (ex: prepares Kronos timesheets for each direct report).
STARS Values/Measurement Tools: Accountability and Service/Supervisor Observations and Reports.
Weight: %
Add an Outcome

Add Performance Notes

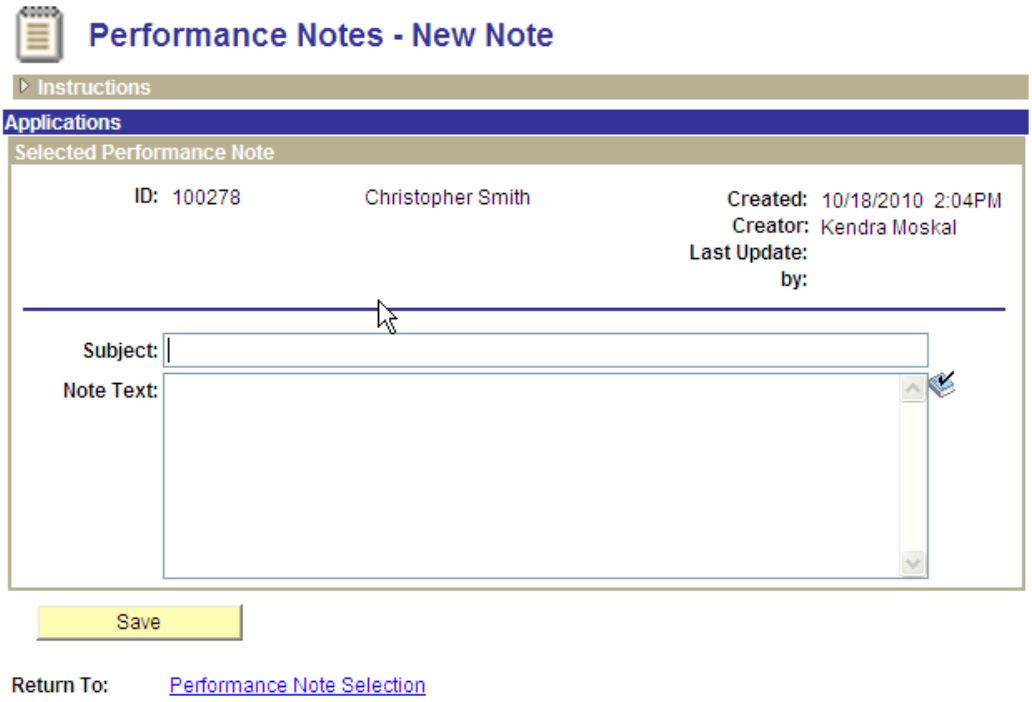
Section Objective

- Add performance note(s)

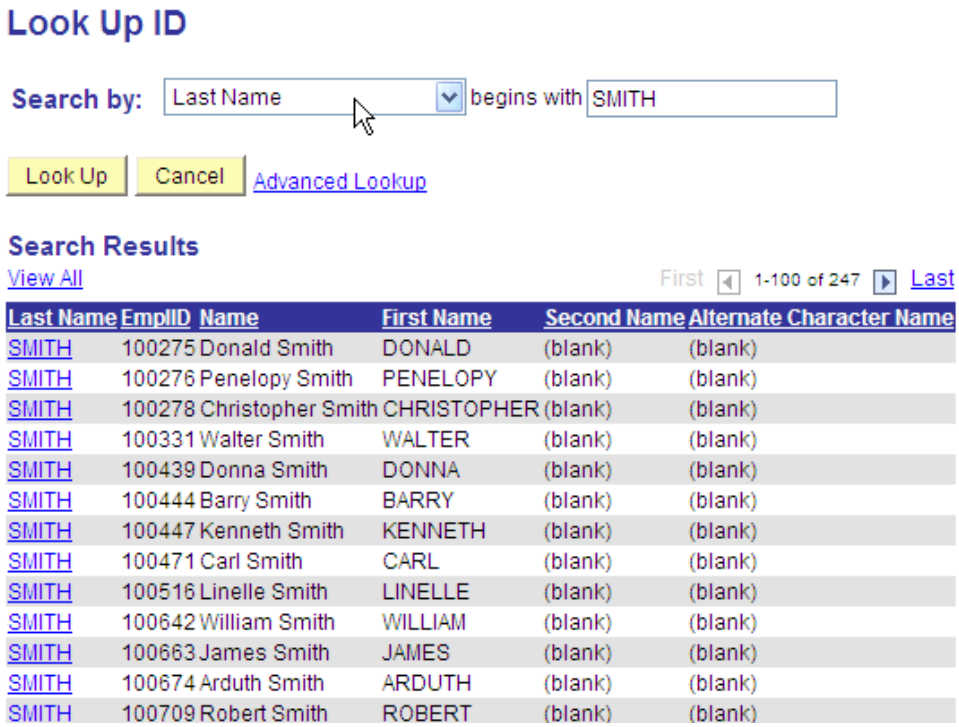
Throughout the year, you can add performance notes for each employee as you receive comments or want to add your own.

To add performance notes follow these steps:

- Click on Performance Management
- Click on Performance Documents
- Click on Maintain Performance Notes
- Enter the employee ID for the employee or click on the magnifying glass to the right of the ID field.
- If you use the magnifying glass search feature, click on the appropriate search item in the “Search by” dropdown (emplid, firstname, lastname, name).
- Click on the link next located to the left of the corresponding employee
- Enter a note start and end date.
- Click on the “Add a New Note” button.



- Edit the notes information including Subject and Note text and then click the “Save” button. Note: The screen will not change after you have saved. If you wish to go back to a PEP click the “Current Document” link in the main menu.


Look Up ID
Search by: Last Name begins with SMITH
Look Up
Cancel
Advanced Lookup
Search Results
View All
First 1-100 of 247 Last
Last Name EmplID Name First Name Second Name Alternate Character Name
SMITH 100275 Donald Smith DONALD (blank) (blank)
SMITH 100276 Penelopy Smith PENELOPY (blank) (blank)
SMITH 100278 Christopher Smith CHRISTOPHER (blank) (blank)
SMITH 100331 Walter Smith WALTER (blank) (blank)
SMITH 100439 Donna Smith DONNA (blank) (blank)
SMITH 100444 Barry Smith BARRY (blank) (blank)
SMITH 100447 Kenneth Smith KENNETH (blank) (blank)
SMITH 100471 Carl Smith CARL (blank) (blank)
SMITH 100516 Linelle Smith LINELLE (blank) (blank)
SMITH 100642 William Smith WILLIAM (blank) (blank)
SMITH 100663 James Smith JAMES (blank) (blank)
SMITH 100674 Arduth Smith ARDUTH (blank) (blank)
SMITH 100709 Robert Smith ROBERT (blank) (blank)

Editing/Deleting Already Existing Duties

Section Objective:

- Edit already existing duty/outcome(s)
- Delete already existing duty/outcome(s)

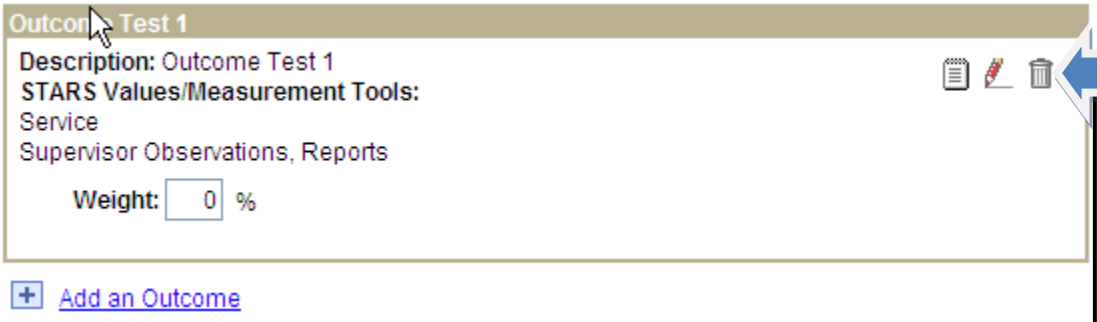
Once a duty has been saved in a PEP, it can still be edited. Observe the pencil and trash can icons that appear to the right of the duty.

The pencil icon (EDIT) and trash can icon (DELETE) can be found on the right side of the duty.

- Clicking on the pencil icon will allow you to EDIT a duty.
- Clicking on the trash can icon will DELTE the duty.

Editing/Deleting an already existing Outcome

Once an outcome has been saved in a PEP, it can still be edited or deleted. Observe the pencil and trash can icons that appear to the right of the duty. You will also observe a third icon, the notepad, for adding performance notes to that outcome.



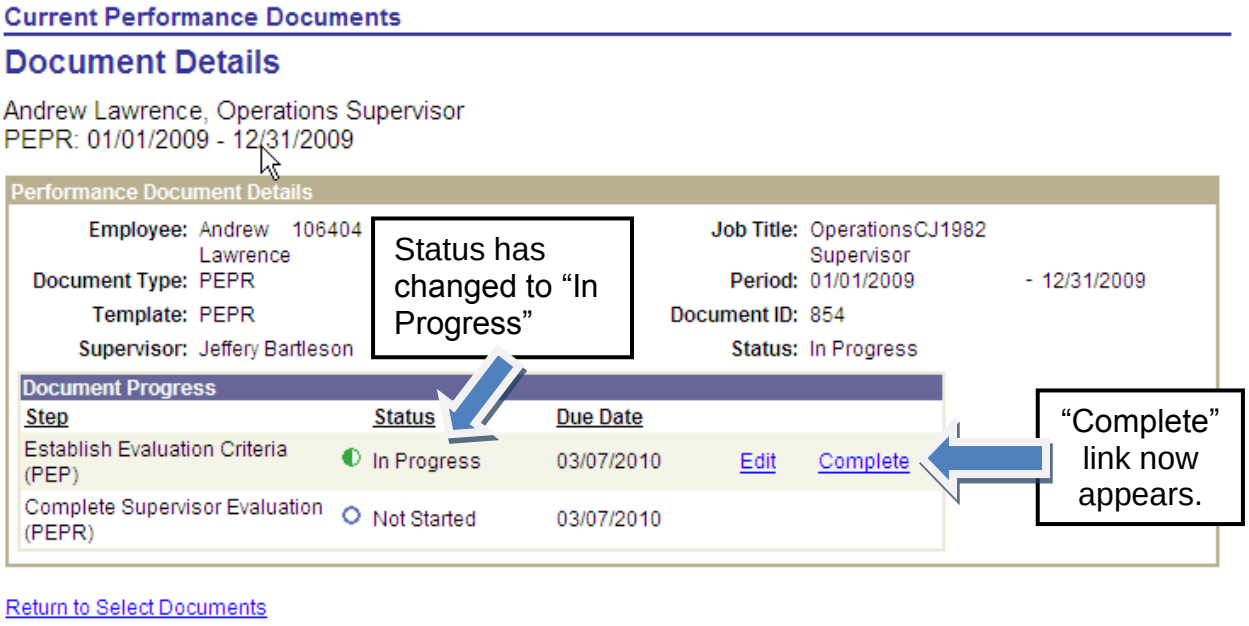
The pencil icon (EDIT) and trash can icon (DELETE) can be found on the right side of the outcome. The third icon, the notepad, is to ADD PERFORMANCE NOTES to the outcome.

Completing the PEP

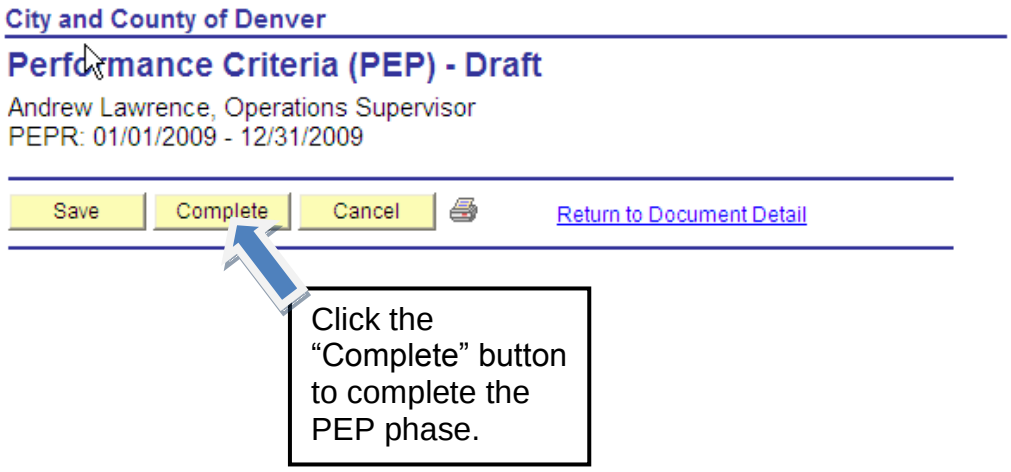
Section objective:

- Complete the PEP

Once you have started the editing process. The Document details screen will change slightly to reflect the status of the PEP and will also add a "Complete" link. You must complete a PEP in order to obtain the ability to rate the outcomes.



To change the document into a PEPR to begin the rating process, click the complete link in the "Establish Evaluation Criteria" section. This will once again bring up the PEP. Click the "complete" button at the top of the document.



The document details screen will now look like this with a "Start" link in the PEPR section. At the top a message appears stating that "You have successfully completed the Establish Criteria step."

Exercise: Create Performance Criteria

1. Click on the “Current Documents” link.
2. Select a PEP that you created in the previous exercise at the start of class.
3. Add multiple duties (2), outcomes (4) and a development item to the PEP using the information in the PEP/R that you brought with you to class. Make sure to weight them appropriately.
4. Make sure to **check spelling** as you are editing using the book/checkmark icon located to the right of the “Description” and “STARS Values/Measurement Tools” fields in the “Add An Outcome” screen, “Add an Additional Duty” screen and the “Add a Development Item” screen.
5. Assign a weight to each outcome if you would like.
6. Add two performance notes on this employee using the “Maintain Performance Notes” menu item (whatever you would like the notes to be) or by clicking on the notepad icon in the duty.
7. Save your work and then complete the PEP.

QUESTION:

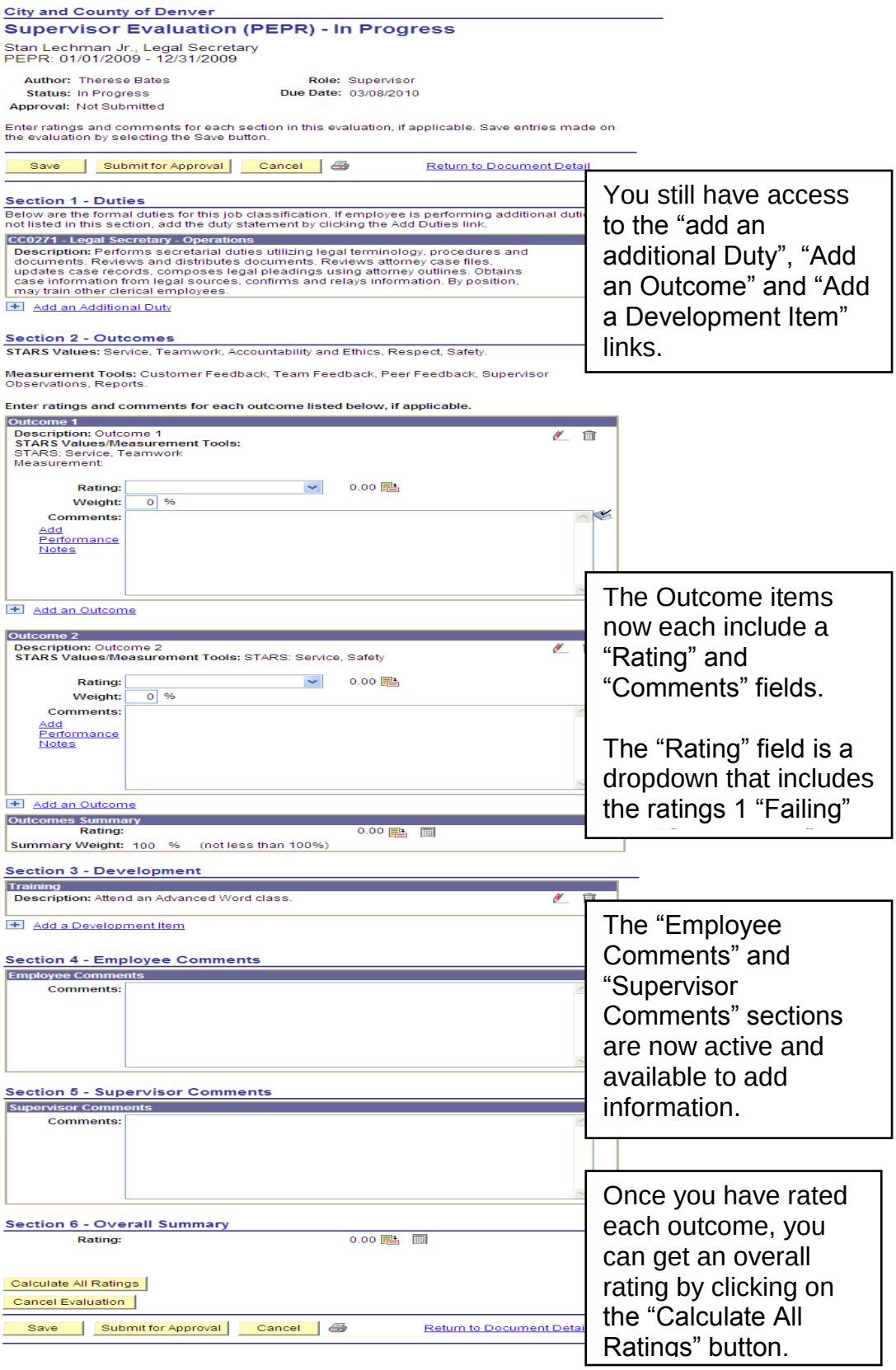
You do not need to worry about whether the outcomes weights total 100% when you COMPLETE a PEP. **TRUE** **or** **FALSE**

PEPR Stage

Section Objectives:

- Add Duties
- Add Outcomes
- Rate Outcomes
- Calculate PEPR rating
- Add/Edit Employee Comments
- Add/Edit Supervisor Comments

Once you have completed a PEP, the document will then become the PEPR. You can still add additional Duties/Outcomes in this phase but we would recommend that you discuss those with the employee. You will also have the ability to rate each item of the Outcome section.


City and County of Denver
Supervisor Evaluation (PEPR) - In Progress
Stan Lechman Jr., Legal Secretary
PEPR: 01/01/2009 - 12/31/2009
Author: Therese Bates
Role: Supervisor
Status: In Progress
Due Date: 03/08/2010
Approval: Not Submitted
Enter ratings and comments for each section in this evaluation, if applicable. Save entries made on the evaluation by selecting the Save button.
Save
Submit for Approval
Cancel
Return to Document Detail
Section 1 - Duties
Below are the formal duties for this job classification. If employee is performing additional duti
not listed in this section, add the duty statement by clicking the Add Duties link.
CC0271 - Legal Secretary - Operations
Description: Performs secretarial duties utilizing legal terminology, procedures and documents. Reviews and distributes documents. Reviews attorney case files, updates case records, composes legal pleadings using attorney outlines. Obtains case information from legal sources, confirms and relays information. By position, may train other clerical employees.
Add an Additional Duty
Section 2 - Outcomes
STARS Values: Service, Teamwork, Accountability and Ethics, Respect, Safety.
Measurement Tools: Customer Feedback, Team Feedback, Peer Feedback, Supervisor Observations, Reports.
Enter ratings and comments for each outcome listed below, if applicable.
Outcome 1
Description: Outcome 1
STARS Values/Measurement Tools:
STARS: Service, Teamwork
Measurement:
Rating:
0.00
Weight:
0
%
Comments:
Add Performance Notes
Add an Outcome
Outcome 2
Description: Outcome 2
STARS Values/Measurement Tools: STARS: Service, Safety
Rating:
0.00
Weight:
0
%
Comments:
Add Performance Notes
Add an Outcome
Outcomes Summary
Rating:
0.00
Summary Weight: 100 % (not less than 100%)
Section 3 - Development
Training
Description: Attend an Advanced Word class.
Add a Development Item
Section 4 - Employee Comments
Employee Comments
Comments:
Section 5 - Supervisor Comments
Supervisor Comments
Comments:
Section 6 - Overall Summary
Rating:
0.00
Calculate All Ratings
Cancel Evaluation
Save
Submit for Approval
Cancel
Return to Document Detail

You still have access to the “add an additional Duty”, “Add an Outcome” and “Add a Development Item” links.

The Outcome items now each include a “Rating” and “Comments” fields.

The “Rating” field is a dropdown that includes the ratings 1 “Failing”

The “Employee Comments” and “Supervisor Comments” sections are now active and available to add information.

Once you have rated each outcome, you can get an overall rating by clicking on the “Calculate All Ratings” button.

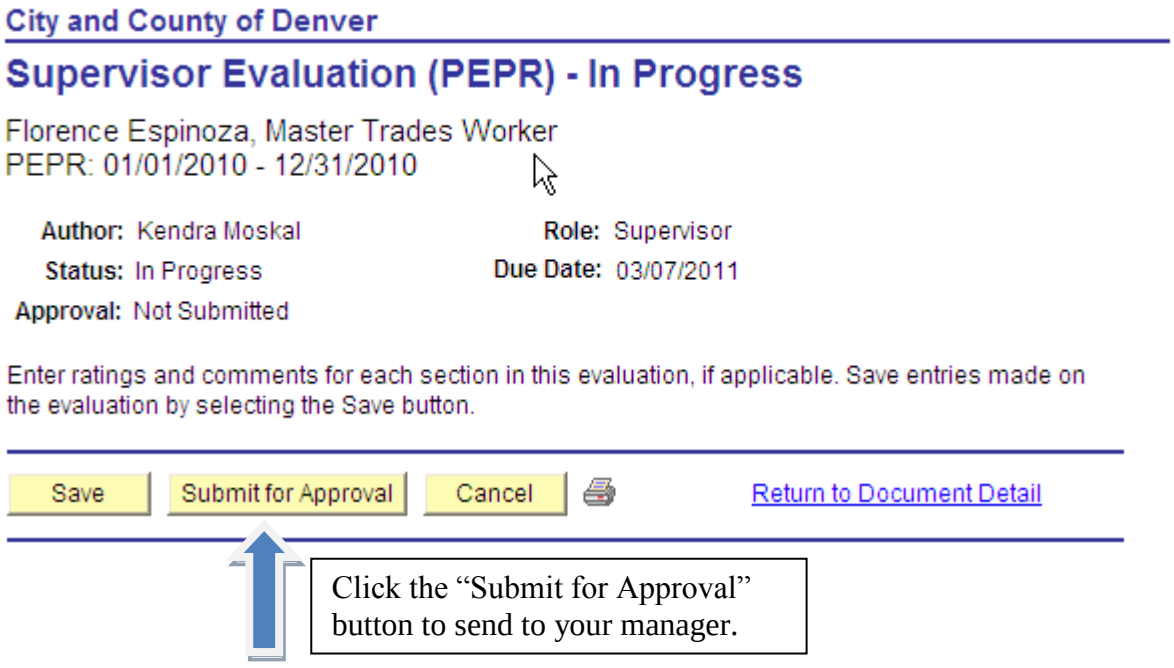
Example of PEPR template

Exercise: Edit and rate a PEPR

1. Click on the “Current Documents” link.
2. Select a PEPR that you completed in the previous exercise.
3. Rate each outcome in the PEPR.
4. Enter comments in each item in the Outcome section and download the performance notes created in the last exercise.
5. Calculate all the ratings.
6. Return to the outcome section and change two of the ratings you entered previously in this exercise and recalculate.
7. What is the overall rating? _____
8. Save your work.
9. Complete the PEPR.

Submit for Manager Approval

Once the PEPR is finished (rated, etc.), you will want to submit the report to your manager for approval. To do so, click the “submit for approval” button and then click the “Submit” button on the Submit for Approval page. Before you click the “submit” button, you will see the overall rating. An e-mail will be generated for both you as the supervisor and your manager. NOTE: The Document Details screen will still show the PEPR with the status of “In Progress”.


City and County of Denver
Supervisor Evaluation (PEPR) - In Progress
Florence Espinoza, Master Trades Worker
PEPR: 01/01/2010 - 12/31/2010
Author: Kendra Moskal
Role: Supervisor
Status: In Progress
Due Date: 03/07/2011
Approval: Not Submitted
Enter ratings and comments for each section in this evaluation, if applicable. Save entries made on the evaluation by selecting the Save button.
Save
Submit for Approval
Cancel
Return to Document Detail
Click the “Submit for Approval” button to send to your manager.

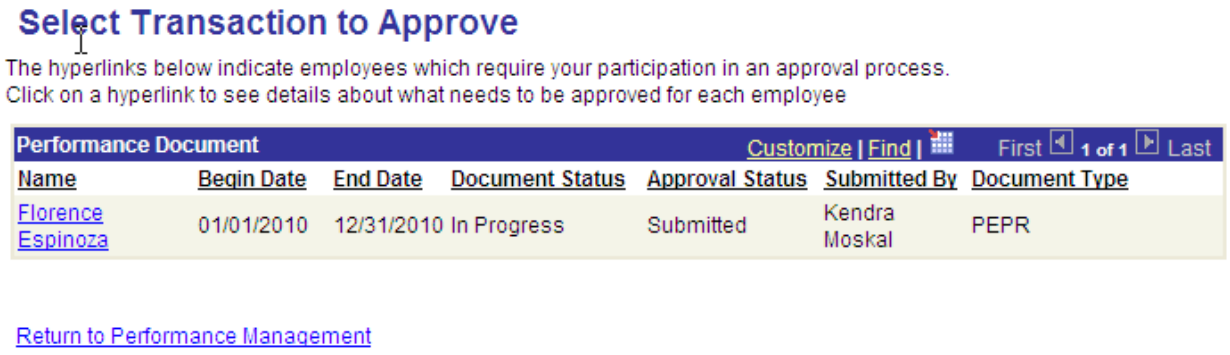
```
The following request was successfully submitted for approval(s).
You will be notified when it is approved or denied by each
approver.

Submitted Request
Employee ID:  XXXXXX
Employee Name:  Joseph Employee
Transaction:  Performance Document

Please visit the following url for detailed information about the
request:
```

E-mail Example

Approving/Deny PEPR at Manager Level

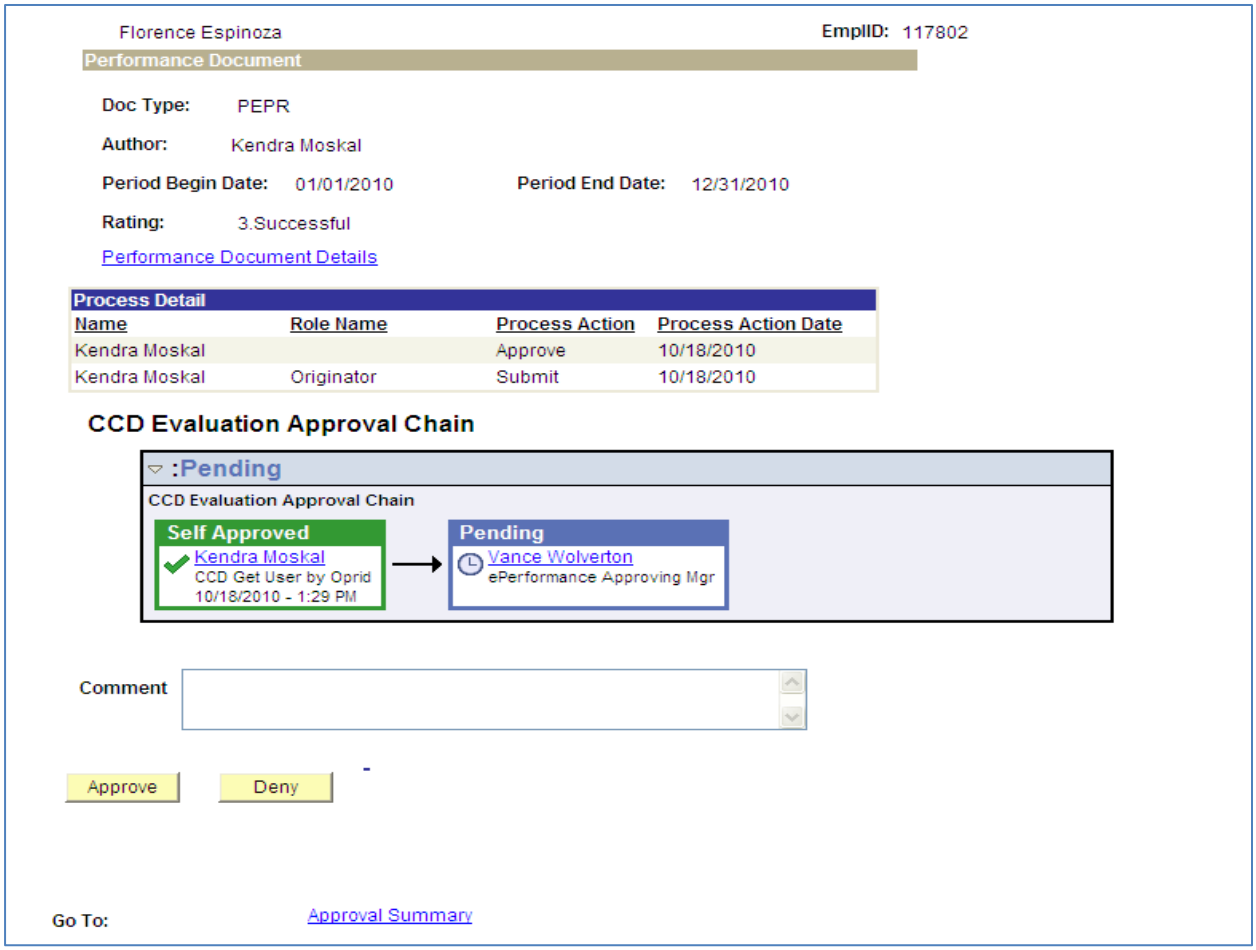
Once the PEPR has been sent to the manager by the supervisor, the manager will receive a workflow e-mail letting them know that the PEPR is available for approval. The manager needs to log into ePerformance and do the following:

- Click on Approve Documents



- Click on the name of the employee to approve
- Enter any comments.
- Click the “Approve” or “Deny” button.
- An e-mail will be generated to the supervisor.
- Supervisor will go to “View Approval Status” to access the comments.
- **If changes need to be made, supervisor will have to “reopen” the PEPR by clicking on the “Reopen” button located at the bottom of the PEPR.**

NOTE: Once the PEPR has received management approval, supervisor will have to complete PEPR one more time (usually after the PEPR has been delivered to the employee). The PEPR will move to the “Historical Documents” section upon final completion.



Below is the latest activity with regard to this self service request.

The following request has been approved by all required approvers and the document has been finalized.

Employee Id: XXXXXX
Employee Name: Isaac Leichtle
Transaction: Performance Document

Please visit the following URL for detailed information about the request:

http://goversdevhr01.gov.dnvr:8780/psp/HR90TMP/EMPLOYEE/HRMS/c/ROLE_MANAGER.EP_APPRAISAL_STAT.GBL?Page=EP_APPRAISAL_EE&Action=U&EP_APPRAISAL_ID=868

This communication was sent via Workflow Technology. Please do not reply to this email.

Exercise: Submit PEPR for Approval and Approve/Deny

1. **As the supervisor**, return to the PEPR you have been working with for the exercises and submit it for approval if you have not done so already.
2. **Log out as the supervisor** and **log in as the manager** using the manager ID that has been provided.
3. Deny the PEPR and enter an approriate reason to deny the PEPR in the "Comment" field.
4. **Log out as the manager** and **log in as the supervisor**.
5. Click on "View Approval Status" from the main menu and check the status of the PEPR.
6. Reopen the PEPR and make a change.
7. Save and Resubmit the document
8. **Log out as the supervisor and log in again as the manager**.
9. Click view comments in the workflow area.
10. Approve the PEPR.
11. **Log out as the manager and log in as the supervisor**.
12. Complete the PEPR.
13. View the PEPR in the Historical Documents section.

Questions:

If a PEPR is denied by a manager, what does the supervisor first need to do to make changes/edits? _____

When in the ePerformance process can you add employee/supervisor comments?

_____

Administrative Tasks

Section Objectives:

- Transfer Documents to another Supervisor
- Reset Document Status
- Cancel Document
- Delete Document

You can perform any of the following items in Administrative Tasks:

- Transfer Documents to another Supervisor
- Reset Document Status
- Cancel Document
- Delete Document

Transfer Documents to Another Supervisor

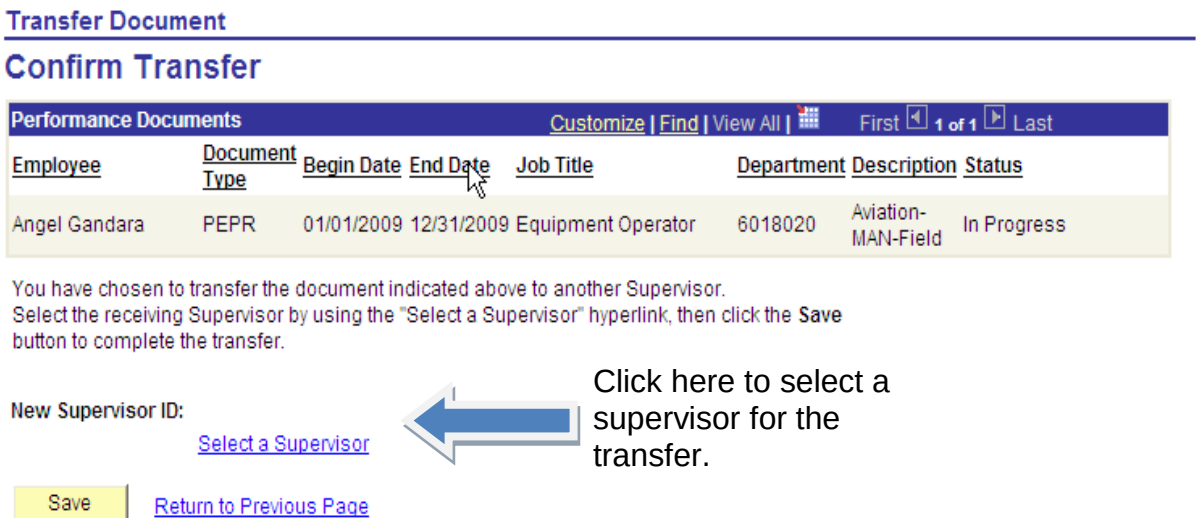
Note: PEP must be "In Progress" to perform this function.

- Click on Performance Management

- Click on Performance documents
- Click on Administrative Tasks
- Click on Transfer Document

Transfer Document
To transfer a performance document, select the checkbox for the Employee and click the Continue push button. Only current documents can be transferred.
Performance Documents
Customize | Find | View All | First 1-3 of 3 Last
Employee
Document Type
Begin Date
End Date
Job Title
Department
Description
Status
Angel Gandara PEPR 01/01/2009 12/31/2009 Equipment Operator 6018020 Aviation-MAN-Field In Progress
Edward Knight PEPR 01/01/2009 12/31/2009 Equipment Operator 6018020 Aviation-MAN-Field In Progress
Matthew Duran PEPR 01/01/2009 12/31/2009 Equipment Operator 6018020 Aviation-MAN-Field In Progress
Select All
Deselect All
Continue

- Select the employee you would like to transfer by placing a checkmark in the box to the left of the name.
- Click the “continue” button. (The confirm transfer screen will appear.)


Transfer Document
Confirm Transfer
Performance Documents
Customize | Find | View All | First 1 of 1 Last
Employee
Document Type
Begin Date
End Date
Job Title
Department
Description
Status
Angel Gandara PEPR 01/01/2009 12/31/2009 Equipment Operator 6018020 Aviation-MAN-Field In Progress
You have chosen to transfer the document indicated above to another Supervisor.
Select the receiving Supervisor by using the "Select a Supervisor" hyperlink, then click the Save button to complete the transfer.
New Supervisor ID:
Select a Supervisor
Click here to select a supervisor for the transfer.
Save
Return to Previous Page

- To select the receiving supervisor, click the “Select a Supervisor” link.
- To search for the receiving supervisor, complete the name, last name or first name field and then click the search button.
- Select the appropriate supervisor from the Person Search – Simple page and then click the “OK” button.
- Verify the information in the Confirm Transfer screen and then click the “Save” button.

- Verify that the save was successful and click the “OK” button on the transfer document screen.

Cancel Document

There may be times when you wish to cancel the PEP/PEPR document due to an employee leaving the employ of the City, etc.

- Click on Performance Management
- Click on Performance Documents
- Click on Administrative Tasks
- Click on cancel document (You will now be on the “Cancel Document” screen.)

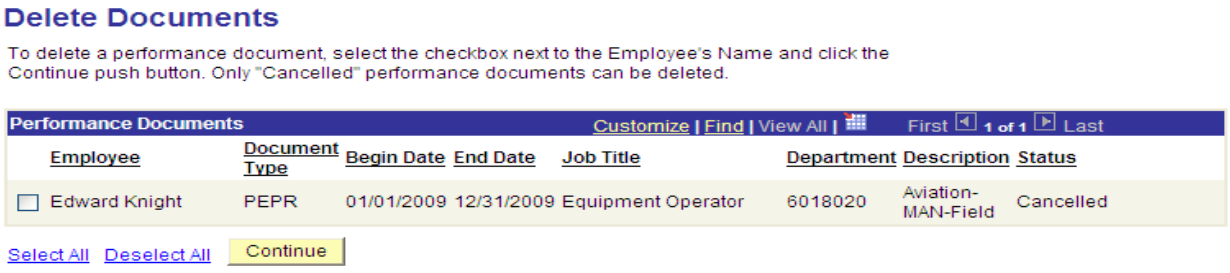
Cancel Document
To cancel a performance document, select the checkbox for the Employee and click the Continue push button. Only "In Progress" documents can be cancelled.
Performance Documents
Customize | Find | View All | First 1-2 of 2 Last
Employee
Document Type
Begin Date
End Date
Job Title
Department
Description
Status
Edward Knight PEPR 01/01/2009 12/31/2009 Equipment Operator 6018020 Aviation-MAN-Field In Progress
Matthew Duran PEPR 01/01/2009 12/31/2009 Equipment Operator 6018020 Aviation-MAN-Field In Progress
Select All
Deselect All
Continue

- Select the name of the employee whose PEP/R you would like to cancel by placing a checkmark in the box to the left of the employee name.
- Click the “Continue” button.
- Verify the cancel information, then click the “Save” button in the Confirm Cancellation screen.

Delete Documents

Once you have canceled the document, it now resides in the delete documents section. To delete a document, follow these steps:

- Click on the “Delete Document” link in the menu found under Administrative Tasks
- Select the name of the employee, whose PEP/R you would like to delete
- Click the “Continue” button.
- Verify the information in the confirm delete screen, then click the “Save” button.
- The deletion should be successful if noted as such in the save confirmation screen.
- Click the “OK” button.


Delete Documents
To delete a performance document, select the checkbox next to the Employee's Name and click the Continue push button. Only "Cancelled" performance documents can be deleted.
Performance Documents
Customize | Find | View All | First 1 of 1 Last
Employee
Document Type
Begin Date
End Date
Job Title
Department
Description
Status
Edward Knight PEPR 01/01/2009 12/31/2009 Equipment Operator 6018020 Aviation-MAN-Field Cancelled
Select All
Deselect All
Continue

Reset Document Status

To change a performance document's status back to "In Progress", select the checkbox next to the Employee's Name and click the Continue button. Only "Available for Review", "Review Held", "Acknowledged", or "In Progress" (with Approval Status of "Submitted" or "Approved") documents can be changed back to "In Progress".

- Click on Reset Document Status located in the “Administrative Tasks” menu.
- Select the employee’s PEPR that you would like to reset by placing a check mark in the box to the left of the name.
- Click the “Continue” button.
- On the Confirm Status Reset page, verify the information. If the information is correct, click the “Save” button.
- Check successful save on the reset document status page and click the “Ok” button.

Reset Document Status
To change a performance document's status back to "In Progress", select the checkbox next to the Employee's Name and click the Continue push button. Only "Available for Review", "Review Held", "Acknowledged", or "In Progress" (with Approval Status of "Submitted" or "Approved") documents can be changed back to "In Progress".
Performance Documents
Customize | Find | View All | First 1 of 1 Last
Employee
Document Type
Begin Date
End Date
Job Title
Department
Description
Status
Matthew Duran
PEPR
01/01/2009
12/31/2009
Equipment Operator
6018020
Aviation-MAN-Field
In Progress
Select All
Deselect All
Continue

Exercise: Delete Performance Documents

1. **Log in as the supervisor.**
2. Click on Cancel Documents in the Menu located under Administrative Tasks.
3. Click the “Select All” link at the bottom of the Cancel Document screen.
4. Click the “Continue” button (You will be taken to the Confirm Cancellation screen).
5. Click the “Save” button on the bottom of the screen (You will be taken to the Save Confirmation Screen).
6. Click the OK button on the Save Confirmation screen. These documents are now ready to be deleted.
7. Click the Delete Document link in the main menu.
8. Click the “Select All” link at the bottom of the screen.
9. Click the “Continue” button at the bottom of the screen (You will be taken to the “Confirm Delete” screen.
10. Click the “Save” button.
11. Click the OK button at the bottom of the “Save Confirmation” screen.
12. Click the “Sign Out” link located in the upper right hand corner of the screen.

Question: Which item(s) do you select from the menu to move a PEP/R to another supervisor?_

Exercise: Allocating Merit Increases
CLASS TITLE: Administrative Support Assistant IV
PAY GRADE & PAY RANGE: 613-C, $33,015-$48,225
DUTIES: Resolves routine, significant and sensitive problems using the specialized/technical knowledge of the organization. Reviews and evaluates facts and makes decisions according to guidelines. Recommends improvements and solutions to organizational problems. Applies and explains the specialized/technical information of the organization to internal/external customers. Reviews organizational information for accuracy and adherence to guidelines. Corrects information when necessary. Prepares and processes documents according to specialized/technical guidelines.

OUTCOMES:
1. Assist with file purging project; create criteria for disposal, storage, and retrieval, using CCD retention guidelines. Project target completion date: 5/11
2. Review and edit all existing information and documentation that goes to customers (internal and external) for accuracy, completeness, and relevancy, using CCD communications protocol. Due by 12/15/10
3. Oversee internal communication flow to assure that team receives messages, mail, meeting notices, etc. Assess current flow and suggest improvements by 11/30/10.

EMPLOYEES:

Employee	**Salary**	**Quartile**
Donald Duck	$40,825	Quartile 3
Mickey Mouse	$35,725	Quartile 1
Minnie Mouse	$39,954	Quartile 2
Daisy Duck	$48,225	Quartile 4
Bugs Bunny	$37,064	Quartile 2
Elmer Fudd	$43,864	Quartile 3

EMPLOYEE PERFORMANCE & PERFORMANCE RATING:

	Outcome 1	**Outcome 2**	**Outcome 3**	**Overall Rating**
Donald Duck				3.3
Rating	*3*	*4*	*3*	
Weight	*.50*	*.25*	*.25*	
Supervisor Comments: Donald is an active participant in our unit's file purging project, specifically, in the development of the criteria of disposal, storage, and retrieval of files. He reviewed and edited all incoming and outgoing documentation for accuracy, completeness, and relevancy in a timely manner. Donald also worked with one of his coworkers to develop a new process for receiving documentation into our work unit, which helped to reduce our processing time. Finally, Donald worked very diligently to ensure that all messages, mail, and meeting notices were disseminated to everyone in our work unit.				
Mickey Mouse				2.8
Rating	*3*	*3*	*2*	
Weight	*.50*	*.25*	*.25*	
Supervisor Comments: Mickey is an active participant in our unit's file purging project, specifically, in the development of the criteria of disposal, storage, and retrieval of files. He reviewed and edited all incoming and outgoing documentation for accuracy, completeness, and relevancy in a timely manner. Finally, Mickey had some issues this year with achieving our internal communication standard. Specifically, Mickey was delinquent in delivering messages and providing meeting notices to staff.				

	Outcome 1	Outcome 2	Outcome 3	Overall Rating
Minnie Mouse				3.0
Rating	*3*	*3*	*3*	
Weight	*.50*	*.25*	*.25*	
Supervisor Comments: Minnie is an active participant in our unit's file purging project, specifically, in the development of the criteria of disposal, storage, and retrieval of files. She reviewed and edited all incoming and outgoing documentation for accuracy, completeness, and relevancy in a timely manner. Minnie also worked very diligently to ensure that all messages, mail, and meeting notices were disseminated to everyone in our work unit.				
Daisy Duck				4.3
Rating	*4*	*4*	*5*	
Weight	*.50*	*.25*	*.25*	
Supervisor Comments: Daisy has taken the lead in our unit's file purging project. Specifically, she guided the team in the development of the criteria for disposal, storage, and retrieval of files. Because of her direction and project coordination skills, the file purging project is ahead of the scheduled completion date of May 2011. Daisy reviewed and edited all incoming and outgoing documentation for accuracy, completeness, and relevancy in a timely manner. Daisy also worked with one of her coworkers to develop a new process for receiving documentation into our work unit, which helped to reduce our processing time. Daisy worked very diligently to ensure that all messages, mail, and meeting notices were disseminated to everyone in our work unit. In addition, Daisy developed new process for distributing mail and meeting notices to all staff members. She also created multiple distribution lists, within Outlook, for various projects and initiatives, to ensure that staff members receive appropriate communications.				
Bugs Bunny				2.0
Rating	*2*	*2*	*2*	
Weight	*.50*	*.25*	*.25*	
Supervisor Comments: Bugs was reluctant to participate in our unit's file purging project. His participation occurred only after a verbal warning from this supervisor. He reviewed and edited all incoming documentation for accuracy, completeness, and relevancy in a timely manner; however, he has not yet learned how to review and edit outgoing documentation. It is this supervisor's recommendation to provide on-the-job training to Bugs on how to review and edit outgoing documentation during the next review period. Finally, Bugs had some issues this year with achieving our internal communication standard. Specifically, Bugs was delinquent in delivering messages to staff and provided inaccurate information on meeting notices. It is this supervisor's recommendation to send Bugs to training on effective communication skills.				
Elmer Fudd				2.8
Rating	*3*	*3*	*2*	
Weight	*.50*	*.25*	*.25*	
Supervisor Comments: Elmer is an active participant in our unit's file purging project, specifically, in the development of the criteria of disposal, storage, and retrieval of files. He reviewed and edited all incoming and outgoing documentation for accuracy, completeness, and relevancy in a timely manner. Finally, Elmer had some issues this year with achieving our internal communication standard. While, Elmer was able to deliver all messages and meeting notices in a timely manner, often, these messages were inaccurate or hard to decipher. It is this supervisor's recommendation to send Elmer to training on effective communication skills.				

Notes

Notes

ePerformance Process

Action	Role
Create Performance Documents (PEP)	Supervisor
Edit Performance Documents (PEP)	Supervisor
Complete Performance Criteria/Turn Into PEPR	Supervisor
Further Refine PEPR (if needed)	Supervisor
Rate Employee/Complete PEPR	Supervisor
Send PEPR for Mgmt Approval **Sup/Mgr Receive E-mail**	Supervisor
Review/Approve or Deny PEPR **Supervisor receives e-mail**	Manager
Review Manager Comments	Supervisor
Make Necessary Changes (if needed)	Supervisor
Return to Manager (if needed) **Sup/Mgr receives e-mail**	Supervisor
Review/Approve or Deny PEPR **Supervisor receives e-mail**	Manager
Deliver PEPR to Employee	Supervisor
Enter employee comments	Supervisor
Complete PEPR	Supervisor